Educational Briefing

Project Officer - Unit Project Officer - Keyperson

Hawaii-Pacific Area
Combined Federal Campaign

CFC

Your Gift Changes Lives!

Training Agenda

- CFC history
- Organization
- Regulations
- Campaign Focus
- Campaign Recognition
- Campaign FUNdraisers
- Campaign Roles
- Frequently Asked Questions
- Campaign Impact

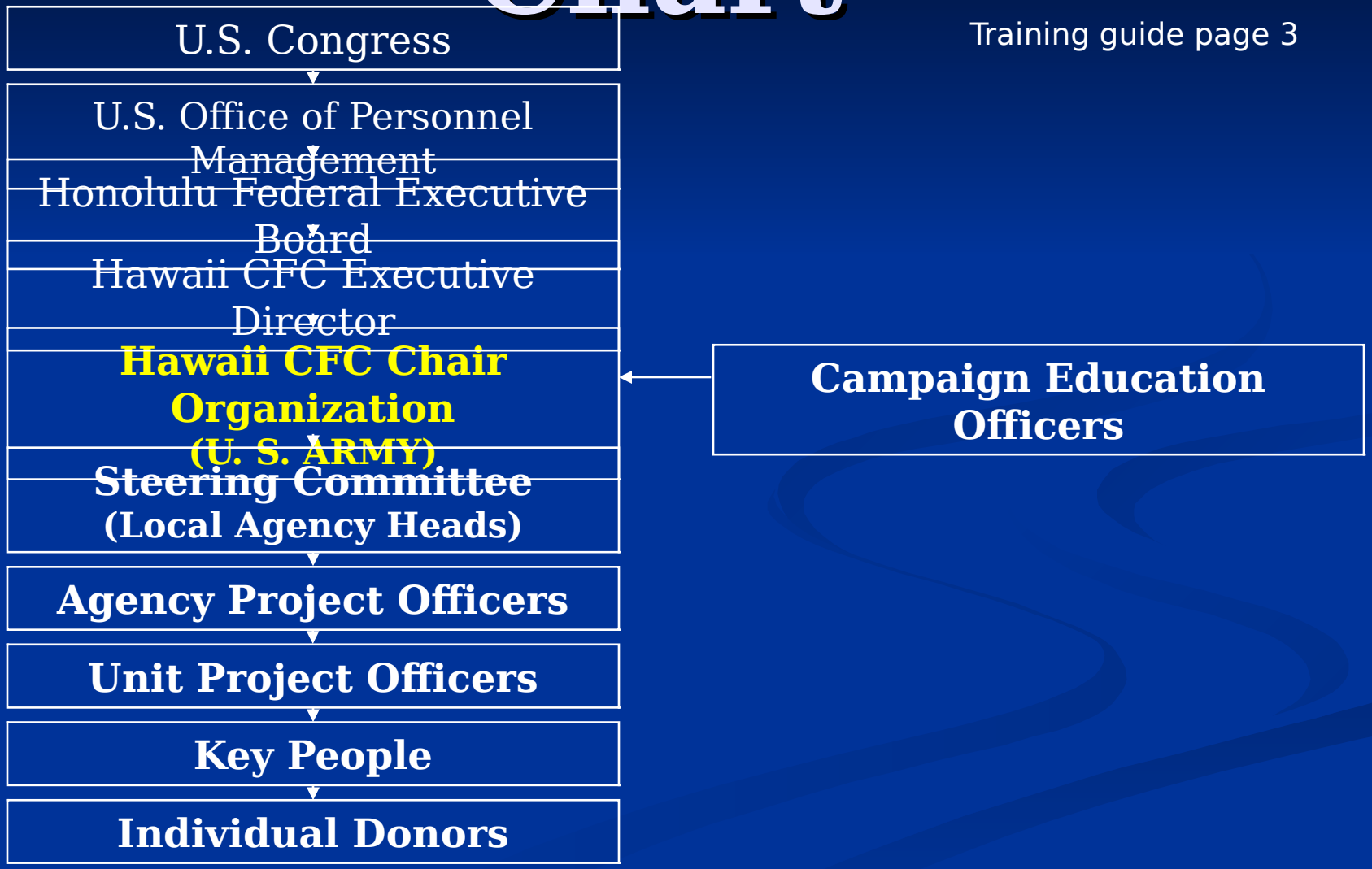
General Information

Training guide page 1

- CFC history
  - Established in 1961 by John F. Kennedy
  - Campaign occurs once a year
    - September 1 – December 15
    - 2006 Hawaii CFC
      - September 19 – October 31
  - About 350 Combined Federal Campaigns
  - Hawaii-Pacific Area CFC is 3rd in size
  - Over $268 million dollars raised nationally

Organizational Chart

Training guide page 3



Local Information

- **History of Giving in Hawaii** Training guide page 1
  - **Number of federal employees**
  - **Average gift has increased**
  - **Participation has declined**
  - **Use of payroll deduction is the preferred method of giving**

Year	Pop	Total Achieved	% Particip	Ave Gift	% Using Payroll
2001	70,517	$5,305,279	56%	$134.83	73%
2002	70,004	$5,425,480	55%	$141.63	72%
2003	72,778	$5,597,193	53%	$146.02	71%
2004	60,442	$4,991,986	51%	$161.30	70%
2005	72,155	$6,117,600	48%	$178.10	72%

CFC Regulations

- **“The CFC is the only authorized solicitation of federal employees in the federal workplace on behalf of charitable organizations.”**
- **“The agency head of each federal agency will initiate campaigns within their offices or installations & provide support for the campaign…”**
- **“Employee solicitations shall be conducted during duty hours…”**

Campaign Focus

- Leadership involvement
  - Be actively involved
  - Demonstrate support
  - Needs to be visible
  - Recognize donors & units
  - Ensure FEAT concept

Campaign Focus

- FEAT
  - Find
  - Educate
  - Ask
  - Thank

Campaign Focus

- **FIND**
  - Locate all units & offices & complete the Agency Population & Payroll worksheet (**Due Aug 10**)
  - Create a contact list for each unit & office (use the Find form) (**Due Aug 10**)
  - Make sure list is complete so that all donors may be contacted
  - Turn completed list into Planning Committee via Agency Project Officer
  - Agency Project Officer & CEO will use the list as a checklist to ensure contact

Campaign Focus

- **EDUCATE**
  - **CEOs will conduct educational briefs**
- **Education Brief (includes the following):**
  - **Introduction of Unit Project Officer & Keypeople**
  - **Leadership remarks**
  - **Show video**
  - **Charity Speaker**
  - **Answer questions**

Campaign Focus

- **ASK**
  - **Keyperson's responsibility**
  - **Visit each federal employee**
  - **Present donor card & brochure**
  - **Answer questions**
  - **Ask for contribution**
  - **Thank everyone!**

Campaign Focus

- **THANK**
  - **Give recognition items to Eagle & Super Eagle givers upon receipt of donation**
  - **Leadership thank you**
  - **Certificates of appreciation**
  - **Memos & e-mails to employees**
  - **Verbally recognize & thank everyone**

Campaign Focus

- **Payroll deduction**
  - **Advantages**
    - **Easier to give**
    - **Allows donors to make a bigger difference**
    - **Does not start until January & continues through December (1 Year & automatically stops)**
  - **Explain advantages when cards are handed out!**
- **End of Service**
  - **Must have three months left to initiate a payroll deduction**
  - **Note: all payroll deduction will automatically stop upon end of service**
- **Reservists**
  - **Preferred method of giving is via cash or check**
- **Contractors**
  - **They may participate via cash or check**

Campaign Recognition

- Suggested Giving
  - Individual Potential
    - Eagle Recognition = Annual base pay x one percent (.01)
    - Super Eagle Recognition = Annual base pay x two percent (.02)
    - Individuals' potentials are located in the brochure & pledge card (suggested giving guide)
  - Agency Potential
    - Award Certificate = Agency's total annual payroll x one percent (.01)
    - 100 – 80 percent of potential = EAGLE Award
    - 79 – 60 percent of potential = GOLD Award
    - 59 – 40 percent of potential = SILVER Award
    - 39 – 20 percent of potential= BRONZE Award
- Recognition
  - Agencies, departments, units, & individuals are recognized based on potential

Recognition Items

Eagle Recognition – 1%Super Eagle Recognition

Refer to the Suggested Giving Gui

Campaign FUNdraisers

- Special FUNdraising Events
  - Refer to the Special Events topic on page 17 of your Training Guide
  - Use to wrap up campaign
  - Bake sales & car washes
  - Increases unit potential achieved
  - Raises morale
  - Have fun!
  - Thank everyone!

Campaign Roles

- Agency Project Officer
- Unit Project Officer
- Campaign Education Officer
- Keypeople
- Individual Donors

Agency Project Officer

- Responsibilities
  - Find all employees: complete population/payroll data sheet, complete FIND form
  - Coordinate with Planning committee for time/date/location to Educate Unit Project Officers, Keypeople, & Donors
  - Distribute materials & recognition items
  - Establish & track the recognition awards within your agency
  - Review completed audit of envelopes & their contents with Unit Project Officers
  - Report to the Agency Head the status of the campaign via the weekly status reports

Agency Project Officer

Training guide page 4

- **Leadership**
  - **Overall responsibility for agency's campaign**
  - **Lead Unit Project Officer in implementing the campaign focus (FEAT)**
  - **Collect the Agency Population & Payroll worksh**

Date:
Agency (name):
Project Officer:
PO Contact Number:

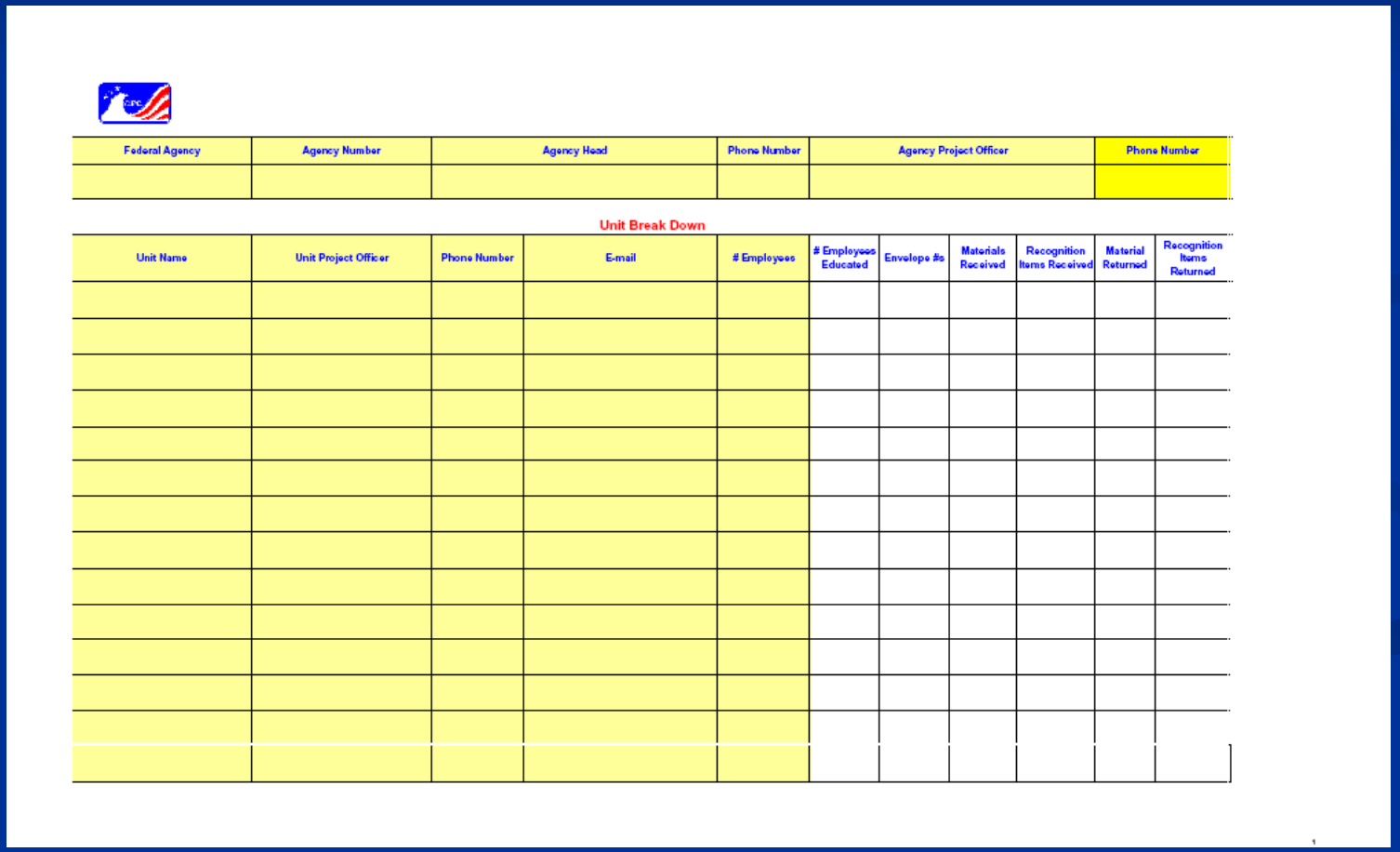
Instructions:
Fill in number of personnel per pay grade below. Spreadsheet will automatically calculate total potential contribution and total population. Verify accuracy of total population (calculated at bottom). Sign and submit to CFC.

2006 AS PAY SCALE

Grade	#of Personnel This Grade	Annual Base Pay	Potential Contrib	Total Potential Contribution
AS-7		32,885	0.0100	-
AS-6		30,618	0.0100	-
AS-5		28,413	0.0100	-
AS-4		26,208	0.0100	-

Agency Project Officer

- **Find**
  - **Complete the Find form**



Federal Agency	Agency Number	Agency Head	Phone Number	Agency Project Officer	Phone Number

Unit Break Down

Unit Name	Unit Project Officer	Phone Number	E-mail	# Employees	# Employees Educated	Envelope #s	Materials Received	Recognition Items Received	Material Returned	Recognition Items Returned

Unit Project Officer

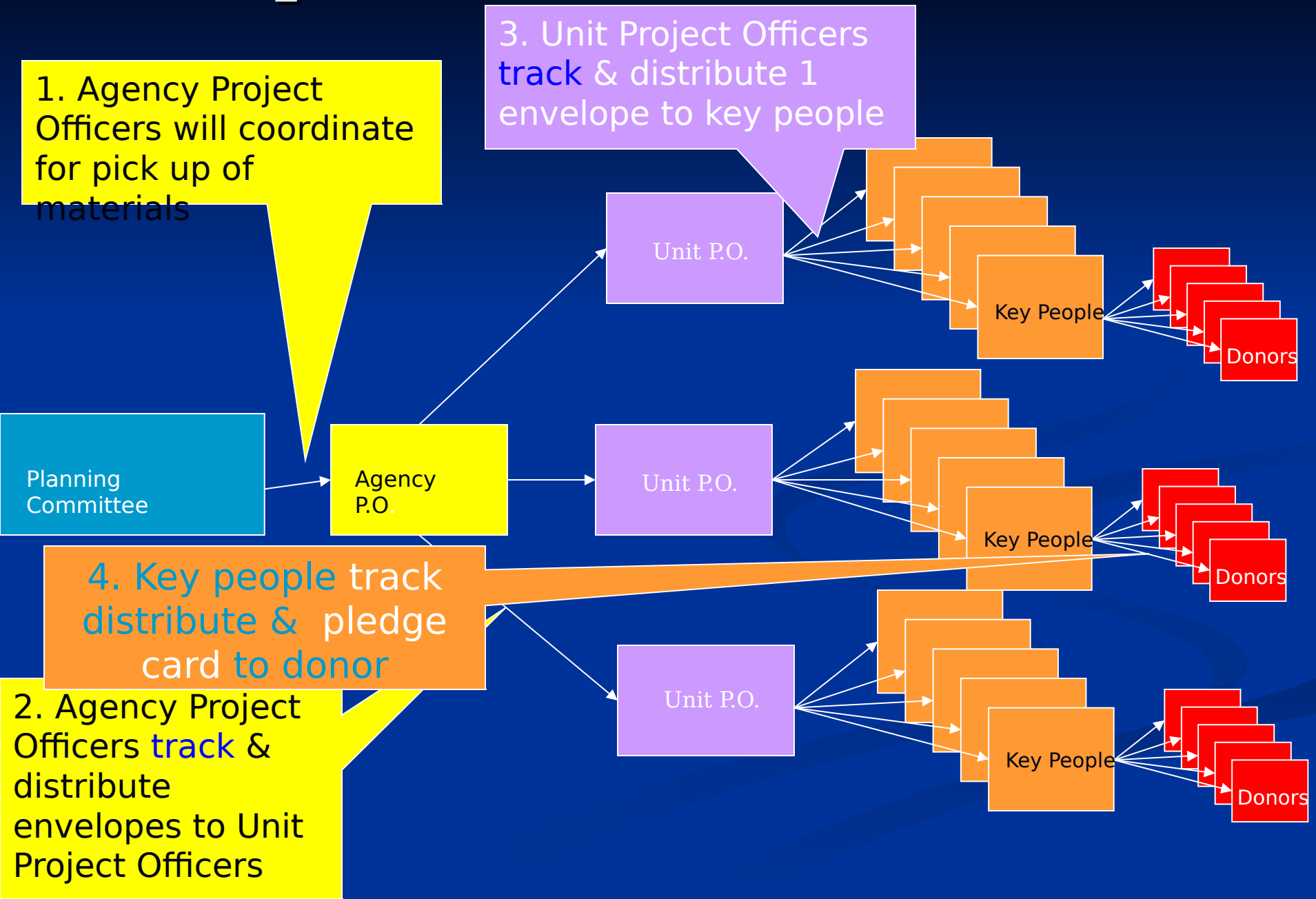
- **Essential Responsibilities** Training guide page 6
  - **Leadership**
    - **Ensure campaign gets visibility**
    - **Encourage fundraisers to wrap up your campaign**
    - **Discourage prohibited practices**
    - **Report to the Agency Project Officer the status of the campaign via the weekly progress reports**
    - **Report to the CFC Planning committee weekly via weekly progress reports**
  - **Accountability**
    - **Materials**
      - **Contents of envelope**
      - **Recognition items**
    - **Deposit slips**
      - **Ensure cash/check donations get deposited, validated, & returned to corresponding envelope – Bank of Hawaii, CFC Account**
    - **Establish & track the recognition awards within your unit**
    - **Review completed audit of envelopes & their contents with Keypeople**

Unit Project Officer

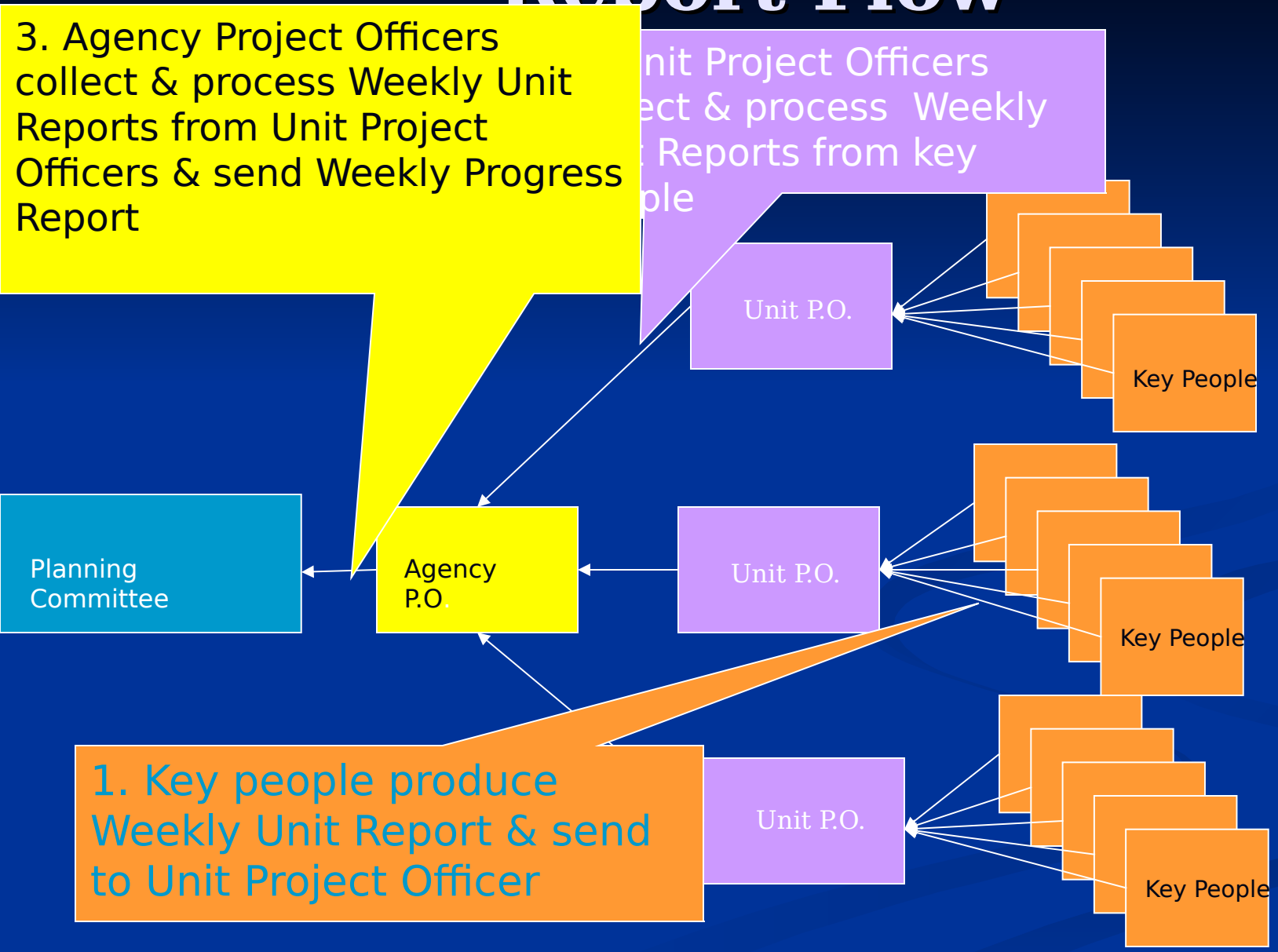
Training guide page 6

- **Action Steps**
  - **Collect the Agency Population & Payroll worksheets within your Unit & provide to your Agency Project Officer**
  - **Identify Keypeople (1 per 25 people)**
  - **Contact CEO for educational briefs for all employees**
    - **Plan time & location for briefs**
    - **Submit Speaker Request Form**
  - **Distribute Envelopes to Keypeople**
  - **Ensure everyone attends an educational brief**
  - **Receive completed envelope from Keypeople**
  - **Audit envelopes to ensure accuracy of pledge cards & Keyperson's Final Report**
    - **Refer to Training Guide Pages 22 & 20**

Envelope & Materials Distribution


1. Agency Project Officers will coordinate for pick up of materials
3. Unit Project Officers track & distribute 1 envelope to key people
Planning Committee
Agency P.O.
Unit P.O.
Unit P.O.
Unit P.O.
Key People
Key People
Key People
Donors
Donors
Donors
4. Key people track distribute & pledge card to donor
2. Agency Project Officers track & distribute envelopes to Unit Project Officers

Report Flow


3. Agency Project Officers collect & process Weekly Unit Reports from Unit Project Officers & send Weekly Progress Report
nit Project Officers
ect & process Weekly
Reports from key
ple
Unit P.O.
Key People
Planning Committee
Agency P.O.
Unit P.O.
Key People
1. Key people produce Weekly Unit Report & send to Unit Project Officer
Unit P.O.
Key People

Campaign Education Officer

- **Responsibilities**
  - **Educate Agency Project Officers, Unit Project Officers, Keypeople, & Donors**
  - **Help with materials & recognition items**
  - **Review completed audit of envelopes & their contents with Unit Project Officers**
  - **Support federal agencies throughout entire campaign**

Training Guide

A MUST READ FOR:

- Keypeople
- Unit Project Officers
- Project Officers

Hawaii-Pacific Area
Combined Federal Campaign

Your Gift Changes Lives!

2006

Training Guide

Reminder

- Find all employees
  - Complete population/payroll data sheet
  - Complete Find form
- Educate all employees
  - Utilize Campaign Education Officers
  - Train Unit Project Officers & Keypeople
- Distribute & account for all materials
- Report campaign status weekly
- Audit & return all materials

Discussion

- Questions
  - If you have one, someone else may have the same one. This is the time to ask!